



A Streamlined Approach to the Management Performance Evaluation Process

Job Aid for 2012 Final Review Stage

This document can be found at the following link
<http://www.mass.gov/anf/docs/hrd/policies/aces/2012/job-aid-final-review.doc>
(For beginner/intermediate level users)

- I. **Getting Started**
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 - c) **Enter Final Ratings and Comments for Remaining Sections**
 - d) **Route Form(s) to ACES Coordinator**
- IV. **ACES Coordinator (HR Dept.) Instructions**

Important Information about the Final Review Process

There should be no sharing of final review ratings with your direct report(s) until being directed by your HR Department.

Appraising Managers. After final review ratings are entered, be sure to click on “**DONE! Send form to ACES Coordinator**”, which routes the form to your agency ACES Coordinator.

ACES Coordinator Stage. ACES Coordinators hold forms in this stage while all forms are being finalized for the agency.




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I. Getting Started

a) Logging into ACES

1. In your Internet browser, click to <https://performancemanager4.successfactors.com/login?company=MA&>
2. **Tip:** Make sure to bookmark this page for quick access on your next visit. In Internet Explorer, click once on **Favorites** in the Menu bar, and then click once on the **Add to Favorites** option.

 **Please enter your login information below. Both your username and password are case sensitive.**

Username:

Password:

[Forgot Your Password?](#)

3. In the **Username** field, enter your **Employee ID**.
4. Type in your current password in the **Password** field.
5. Click on the **Login** button. The ACES welcome page opens.

b) Forgot Your Password?

1. If you **forgot your password**, click once on the **Forgot Your Password?** link. You will be redirected to a page where you may retrieve your password via e-mail by entering your **Employee ID** in the **Username** field then click **Email Me**.

Username:

2. You should receive a system generated email with new login information within a few minutes. Once you login you will be prompted to enter your system generated password, then re-enter your new password twice.

Notes on the emails and passwords:


1. In the system generated email, the letters O and zero look alike and the letter "el" and number one look alike. Therefore, you might cut and paste the password from the system-generated email directly into the Password field.
2. Notify your Agency [ACES Coordinator](#) if you don't receive the e-mail message. If you've tried logging on too many times with the wrong password, you will get message indicating that your account has been locked and to contact your local administrator. Your agency [ACES Coordinator](#) can unlock your account or you can send an email to [ACESHelp](#).




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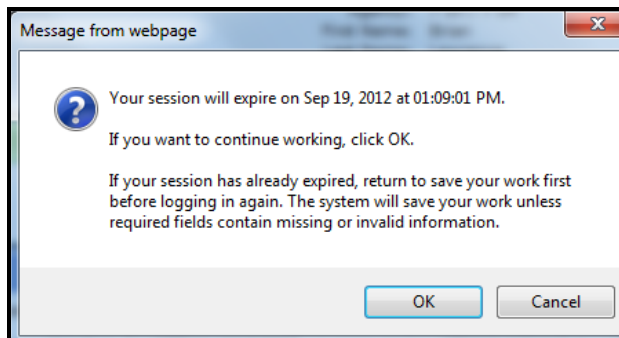
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c) Save your Work every 10 Minutes

1. Your ACES Online session will timeout after 30 minutes of inactivity. Since text entry is not registered by the system as activity, be sure to save your work every 10 minutes by clicking on the “Save”  icon on the top navigation bar.

Caution

If you have not clicked on “Save”  within 20 minutes of typing on a form, the following window will appear.

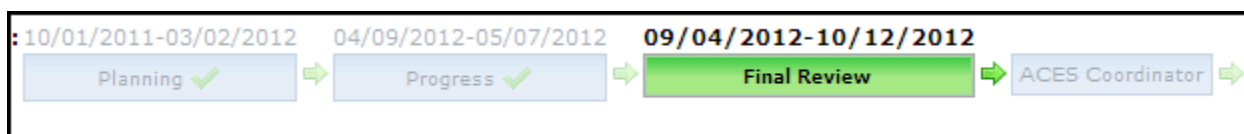


To save your work, click on **OK**. Once you have re-accessed your form click on “Save”  to save your work.

II. Reporting Manager Instructions


a) Locate your ACES Form & Determine Its Current Stage

1. Click on **My Forms** to locate your 2012 ACES Form. Click on link to access your ACES form. Verify that the form is in the **Final Review** phase. The current phase will be highlighted in green (see screen shot below).



Note:

If no phase boxes appear at the top of your ACES form, click on **+** sign near **Route Map**

 to view the current stage of the form.

Skip to step 4 on the next page if your form is in your inbox in **Final Review** Stage.



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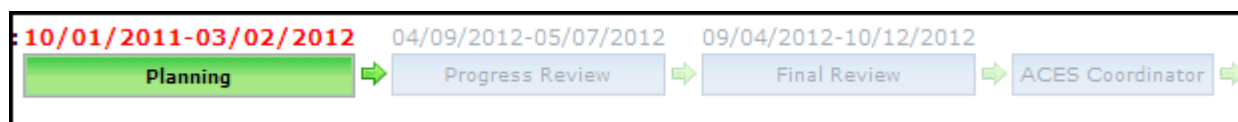
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II. Reporting Manager Instructions (continued)

2. If your form is in **progress review stage**, ask your appraising manager to click on the **DONE** button (see sample below) to route your form to Final Review Stage.



3. If your form is in **planning stage**, ask your appraising manager to click on the **DONE** button to move your form to progress review stage. Your Appraising Manager will then need to enter progress ratings based on mid-year performance in May 2012, and click on **DONE** to move it to Final Review Stage.



Notes:

If your agency is skipping progress review stage for ACES 2012, your agency [ACES Coordinator](#) will need to use his/her [Administrative Delegated Access](#) to route your form from Progress Review to Final Review Stage.

Your appraising manager may also refer to the job aid entitled [Moving Your ACES Form to the Right Step](#).

b. Enter Final Review Comments on your Performance

4. Click on the **Manager Objectives** link in the left navigation bar (see sample below to right). Review and update milestones, if needed. Enter optional comments in the **Final Review Comments** box for each **Manager Objective**.

The screenshot shows a text input field titled 'Final Review Comments by Brian Lawrence:'. The text inside the field reads: 'All 10 classes were delivered ahead of schedule by August 31, 2012'. To the right of the text field are two icons: a green 'spell check...' icon and a yellow 'legal scan...' icon.

5. Click on **Career Growth Objectives** link. Review and update milestones, if needed. Enter optional comments under “**Comments by [your name]**” box.

The screenshot shows a text input field titled 'Comments by Brian Lawrence:'. The text inside the field reads: 'Completed the following three mandatory manager trainings which included the following:'. Below this text is a list of three items: 1) 'Domestic Violence/Sexual Assault and Stalking/Workplace Violence Prevention' - completed e-Learning on 03/16/12; 2) 'Preventing Sexual Harassment in the Workplace for Supervisors and Managers' - completed e-Learning on 06/12/12; 3) 'Diversity Part II Disability Awareness for Managers' on 07/26/12. To the right of the text field are two icons: a green 'spell check...' icon and a yellow 'legal scan...' icon.

Employee Information
FINAL REVIEW INSTRUCTIONS
I. Manager Objectives
II. Career Growth Objectives
III. Core Managerial Competencies
IV. Progress Review Overall Rating and Comments
V. Final Review Overall Comments
VI. Final Review Overall Rating
VII. Completion of EPRS Forms



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II. Reporting Manager Instructions *(continued)*

6. Click on **Core Managerial Competencies** link and scroll to bottom of section to enter any optional comments relating to competencies.
7. Click on the **Final Review Overall Comments** link to list any optional comments relating to your overall performance this year.

8. Click on the **Completion of EPRS Forms** link to confirm whether you have completed EPRS evaluations for your non-managers. Select either “**I have completed EPRS forms for my non-managers**”, or “**Not applicable – I do not have any non-management direct reports.**”

9. Click on **spell check** icon  at top of form to complete a spell check of the entire ACES form.



10. Click on **save** icon  at top of form to save the entire form.



11. Click on **Save and Close** icon at the bottom of the page, to save your work and close out of your ACES form.

12. Notify your appraising manager that you have finished entering final comments onto your form.



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III. Appraising Manager Instructions

For more information on selecting final ratings, please refer to [ACES Rating Scale Definitions](#) document accessible on the HRD's [2012 ACES Final Review](#) page.

Important Notes:	<p>1. No sharing of final ratings with your direct report(s) until being directed by your Secretariat/Agency HR Director. Appraising managers should not be sharing final ratings with reporting managers until after receiving HR approval, and as directed by your agency ACES Coordinator/Secretariat HR Director notifying your agency that ratings may be shared.</p> <p>2. Final Ratings are hidden when Form is in Final Review Stage. In final review stage, the appraising manager can view the reporting manager final comments. However, the final review ratings and comments you (the appraising manager) enter will <u>not</u> be able to be viewed by the reporting manager until the form is in Signature Stage.</p>
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a) Access your Reporting Manager(s) form & Determine its Stage

1. Your reporting manager should inform you when he/she has finished entering final review comments.
2. Login into ACES and click on **My Forms** link.
3. Click on link to access the reporting manager's ACES form.

<input type="checkbox"/>	Form Title	Reporting Manager	Step	Date Assigned	Step Due Date	Form Start Date	Form End Date	Form Due Date	Last Modified	Sent From	Action
<input type="checkbox"/>	★ 2012 ACES Form for Brian Lawrence	Brian Lawrence	Final Review	06/29/2012	10/12/2012	10/01/2011	09/30/2012	09/30/2012	09/17/2012	Brian Lawrence	i

4. Verify that the form is in the **Final Review** phase. The current phase will be highlighted in green (see screen shot below).



Note:	<p>If no phase boxes appear at the top of the ACES form, click on + sign near Route Map  to view the current stage of the form.</p>
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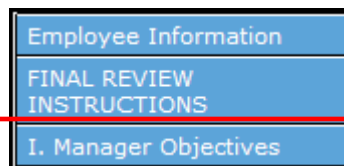
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III. Appraising Manager Instructions (*continued*)

5. If your reporting manager's form is currently in **planning** or **progress review stage**, you will need to complete the planning and progress review steps prior to entering final ratings for your reporting manager in the Final Review Phase. Please refer to the job aid entitled [Moving Your ACES Form to the Right Step](#) for more information on how to get the form to Final Review stage.

b) Rate Manager Objectives

6. Click on the **Manager Objectives** button in the left navigation bar.
7. Review the comments (if any) by your Reporting Manager in the **Final Comments** field under each Manager Objective. If applicable, add your own comments to this section.



Final Review Comments by Brian Lawrence:
All 10 classes were delivered ahead of schedule by August 31, 2012

Final Review Comments by Mark Lancaster:

[spell check...](#) [legal scan...](#)

8. From the **Final Rating** dropdown box, select the appropriate rating for each **Manager Objective**.

Final Rating:

9. Repeat steps 7-8 above by entering final ratings (and adding optional comments) for each **Manager Objective**.

c) Enter Final Ratings and Comments for Remaining Sections

10. Click on **Career Growth Objectives** link. Review the comments (if any) by your Reporting Manager in the **Comments** field(s) for each Career Growth Objective. Add your own comments to this section.

Comments by Brian Lawrence:
Completed the following three mandatory manager trainings which included the following:

- 1) "Domestic Violence/Sexual Assault and Stalking/Workplace Violence Prevention" - completed e-Learning on 03/16/12
- 2) "Preventing Sexual Harassment in the Workplace for Supervisors and Managers"- completed e-Learning on 06/12/12
- 3) "Diversity Part II Disability Awareness for Managers" on 07/26/12

Comments by Mark Lancaster:

[spell check...](#) [legal scan...](#)

11. From the **Final Rating** dropdown box, select the appropriate rating for each **Career Growth Objective**.

Final Rating:

12. Repeat steps 10-11 above for by entering final ratings (and adding optional comments) for each **Career Growth Objective**.



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III. Appraising Manager Instructions (continued)

13. Click on **Core Managerial Competencies** link. For each behavior listed select a relative rating.

Communication / Interpersonal Skills	Rating by Mark Lancaster
Calculated Rating: Please Select	
Demonstrates effective oral communication skills (including facilitation, formal presentations, etc. if applicable.)	Please Select
Demonstrates effective written communication skills (including complex or technical reports/memos if applicable.)	Please Select
Encourages collaboration and ensures sense of ownership of goals. Creates understanding of individual contribution and strong team morale.	Please Select
Handles difficult people well by using good listening skills and diffusing conflict.	Please Select
Receives constructive criticism well and responds by changing behavior or taking other appropriate action.	Please Select
Decision-Making Skills	

14. Optional comments may also be added to the **Core Managerial Competencies** section.

Section Comments: writing assistant: Select One

Comments by Mark Lancaster:

[spell check...](#) [legal scan...](#)

15. Click on the **Final Review Overall Comments** link in the form navigation bar. Review the comments (if any) by your Reporting Manager in the **Final Comments** field(s). Add your own comments to this section.

V. Final Review Overall Comments

The Writing Assistant and Coaching Advisor tools provide access to ideas for comments related to specific skills and development tips. You can copy appropriate text and paste it into the comments box then edit comments if needed.

Final Comments

Comments by Brian Lawrence:
All objectives planned for ACES 2012 evaluation cycle were completed on time and ahead of schedule.

Comments by Mark Lancaster:

[writing assistant...](#) [spell check...](#) [legal scan...](#)

16. Verify that your manager has selected an option under **Completion of EPRS forms** section (see screen shot below). Your manager should have selected either “**I have completed EPRS forms for my non-managers**”, or “**Not applicable – I do not have any non-management direct reports.**” A selection needs to be chosen prior to the form being sent to the [ACES Coordinator](#).

VII. Completion of EPRS Forms

Please confirm whether you have completed EPRS evaluations for your non-managers.

I have completed EPRS forms for my non-managers

17. Click on the **Final Review Overall Comments** link in the form navigation bar. Review the comments (if any) by your Reporting Manager in the **Final Comments** field(s). Add your own comments to this section.
18. Click on the **Final Review Overall Rating** link. Using the drop-down arrow, select a rating for the **Overall Final Review Rating**.

VI. Final Review Overall Rating

For guidelines on selecting a Final Review Overall Rating, please visit HRD's [2011 ACES Final Review](#) page.

Overall Final Review Rating Please Select





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III. Appraising Manager Instructions (*continued*)

For more information on final rating definitions, please refer to [ACES Rating Scale Definitions](#) document accessible on the HRD's 2012 ACES Final Review page.

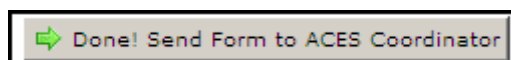
19. Click on **spell check** button  at top of form **to complete a spell check of the entire ACES form.**

20. Click on **save** button  at top of form **to save the entire form.**

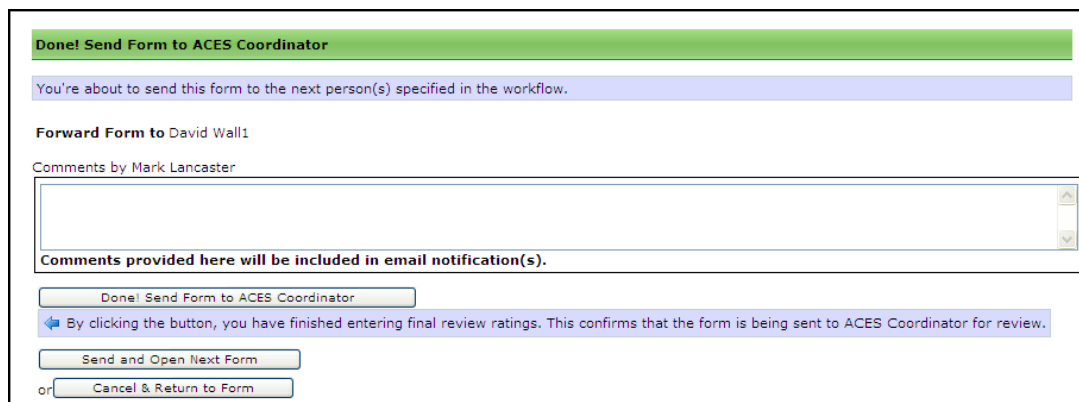
d) Route Form(s) to ACES Coordinator

Once you have finished entering ratings on your reporting manager's ACES form, the next step is to route the form to your agency ACES Coordinator's inbox while all final review ratings are being entered and finalized.

21. At the top or bottom of the form, click on **DONE! Send to ACES Coordinator** (see image below) to send the form to your agency [ACES Coordinator](#).



22. A new window opens. In text box, enter any comments to be included in an email that will be sent to the ACES Coordinator. Click on **DONE! Send to ACES Coordinator** button. Please note that comments entered in this text box are neither required nor are they incorporated into the reporting manager's ACES evaluation form.



If in the process of completing above step you realize you need to re-access the form, click on **Cancel & Return to Form** button to cancel sending the form to the ACES Coordinator.

23. A copy of your Reporting Manager's form will appear in your **En Route** folder located in the **My Forms** tab. The current with column indicates the person who is currently in possession of your reporting manager's ACES form.

Display Options		Form Title	Reporting Manager	Step	Currently With	Step Due Date	Form Start Date	Form End Date	Form Due Date	Last Modified	Action
En Route		★ 2012 ACES Form for Brian Lawrence	Brian Lawrence	ACES Coordinator	David Wall1		10/01/2011	09/30/2012	09/30/2012	09/17/2012	



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IV. ACES Coordinator (HR Dept.) Instructions

1. Similar to last year, ACES Coordinators hold completed ACES forms in their inbox until being notified by their Secretariat that their rating distribution has been approved.

ACES Coordinators are then responsible for moving all 2012 ACES forms from ACES Coordinator Phase to Signature Stage. If you are an ACES coordinator and do not have **HR** link in the left navigation bar of **My Forms** page (see sample to the right), please notify [ACESHelp](#), so that we may update your administrative access in ACES.

All Forms
In Progress
Inbox
En Route
Completed
HR
Form Status

2. ACES Coordinators can edit any of the final ratings, if necessary.
3. Coordinate receipt of all forms **on or before October 12, 2012.**
4. Once your secretariat has notified you that your agency ACES rating distribution has been approved, click on the **Approve** button to mass approve all agency ACES forms from ACES Coordinator stage to signature stage.

A separate job aid is be available on HRD's [2012 ACES Signature Stage](#) page with more details on moving forms from ACES Coordinator to signature stage including details on how managers can electronically sign the forms.